

TO: Bob Jones *Bill*  
FROM: Bill Lynch  
SUBJECT: RECORDS COORDINATORS TRAINING

DATE: December 19, 1990

On Tuesday afternoon, December 18, Cecilia and I attended the training session sponsored by the Legal Department for all Records Coordinators participating in the implementation and maintenance of the PM USA Records Management Policy. Prior to the meeting, we met with Arthur DeBaugh and Ray Hartwell of Hunton & Williams and Clare Purcell to share information and provide input as to the areas identified by Records Management, through our interaction with the Records Coordinators, which needed to be expanded and clarified as part of the presentation. Arthur DeBaugh and Ray Hartwell chaired the meeting with Clare Purcell providing comments and observations. Cecilia and I provided technical support and acted as a resource to the group. The presentation was carried out based upon a script approved by the Legal Department. Only 12 of the 24 Records Coordinators invited to the meeting attended the session. A second program will be scheduled probably during February as a result of the turnout. The program included the following:

- 1) The completion of an attendance sheet.
- 2) Introduction and overview by Ray Hartwell and Clare Purcell.
- 3) The issue of a handout (see attached)
- 4) A short slide presentation by Arthur DeBaugh
- 5) The issue of a revised Records Management Manual dated 12/14/90.
- 6) A review of all sections of the manual focusing on the Records Coordinator's responsibilities.
- 7) Establishment of a 1/25/91 date for all department reviewed retention schedules to be returned by the Records Coordinators to Arthur DeBaugh for finalization and issue. This will be followed by a 60 day implementation report.
- 8) Records Management provided contact names and telephone numbers to the group if assistance is required.

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It is recommended that Records Management take a proactive stand and institute the following:

- 1) Survey Records Coordinators to identify how they perceive Records Management and how we can best assist them to carry out their responsibilities.
- 2) Schedule quarterly training sessions for all Records Coordinators focusing upon general records management information, straight forward how-to-do-it instructions and cooperative creative problem solving.
- 3) Develop handouts with flowcharts describing, in a simple format, how to accomplish standard records management tasks.
- 4) Provide technical assistance and consultation, as required, on an individual basis to Records Coordinators.

cc: C. McLaughlin

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